

Worklist Approval Process Using CHRIS Workflow

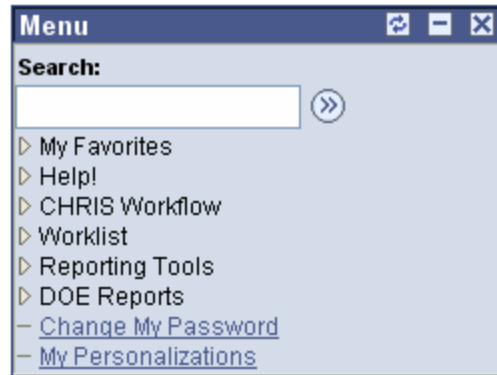
NOTE:

To approve training through CHRIS Workflow, users MUST have a completed Workflow Profile. If you have not set up your Workflow Profile or if not sure if yours is compliant, go back to the previous page :

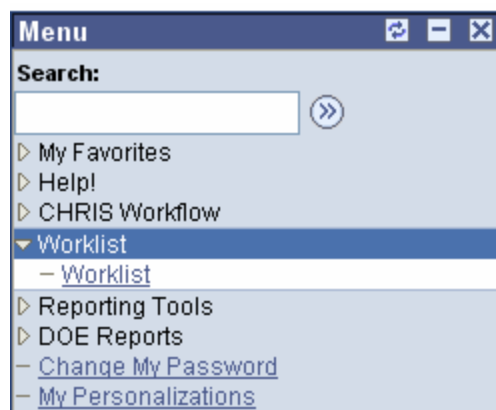
<http://www.eh.doe.gov/administration/training/workflow/SupvsrWorkflow.pdf>
and follow the appropriate instructions.

Approve Training Requests :

1. Log onto Employee Self Service (ESS) <https://mis.doe.gov/ess>
2. Connect to CHRIS/PeopleSoft
3. Click on:
 - .. Worklist



- ◆ Click on -Worklist



- ◆ Your Worklist will come up

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Worklist for your employee #: Your Name

Worklist			Find View All
From	Date From	Link	
Employee's Name	10/26/2005	Employee's Name	<u>2005-11-02, 001401, 0057, Prevent. of Sexual Harassr</u>

- Click “Link” Area this is any where in the link column where employee name, date of training, course #, session #, and name of class are underlined.
- Employee’s Training Request will come up

Workflow

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Training Request Form | Approval Routing

Training Request

Employee's Name Subagency: EH

Workflow Entry ☒ ☐ Conference
☐ On IDP
☒ TQP Related
☐ Transition Related

*Attendance: Request
 Course Type: Equal Employment Opport
 *Internal/External: Internal
 Course Code: 001401
 Course Title: Prevent. of Sexual Harassment
 Session #: 0057
 Begin/End Date: 11/02/2005 11/02/2005
 Start Time: 2:00PM End Time: 4:00PM

Est Direct Costs	Indir
Tuition \$	Ti
Books \$	Per l
Materials \$	C
Other \$	

- Review Request
- Once the request has been reviewed – click on **Approval Routing Tab** at top of request form.
- Approval Routing** template will come up
 - NOTE:** Approval template **MUST** have each step filled out as in the example below. If any part of template is not correctly indicated this will stop the routing process or lock the system up.
 - Check first** to see if Step2 has “None/Skip” in the Initiator drop down box and the box in the Skip column is checked – this should also appear greyed out.
 - If yes** – verify reset of Approval form

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- **If no** - immediately Recycle request – by opening drop down box next to your name in step one and select “Recycle” - in Recycle Comments section indicate “Improper Profile” - then click on the **SAVE** button at bottom left of screen. This will send request back to the originator to correct. **If this is not done system will lock up.**

Workflow Role	Approver	Skip	Status	Action Date	Recycle Rema
Step0: Initiator	Employee's Name		Requested	10/26/2005	Training App
Step1: Approver1	Your Name				
Step2: None/Skip		<input checked="" type="checkbox"/>			
Step3: None/Skip		<input checked="" type="checkbox"/>			
Step4: Budget	Kelly, Kevin NMN	<input type="checkbox"/>			
Step5: Trng Proc	Chapman-Turner, Donna C				

Remarks:

- If Approval Routing is incomplete AND Step2 is checked in the Skip column box, you can correct and approve the request to continue the process and remove from your Worklist by:
 - Step 3 – Check the box in the Skip column
 - Step 4 – Click on Magnifying Glass Icon and select Kevin Kelly
 - Step 5 - Click on Magnifying Glass Icon and select Donna Chapman-Turner
 - Notify employee to correct profile for future requests.

9. To Approve, Deny, Reassign or Recycle request:

Workflow Role	Approver	Skip	Status	Action Date	Recycle Rema
Step0: Initiator	Employee Name		Requested	10/26/2005	Training App
Step1: Approver1	Your Name				
Step2: None/Skip		<input checked="" type="checkbox"/>			
Step3: None/Skip		<input checked="" type="checkbox"/>			
Step4: Budget	Kelly, Kevin	<input type="checkbox"/>			
Step5: Trng Proc	Chapman-Turner, Donna C				

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- ◆ **Click** on dropdown box for Step 1 under the Requested column to the right of your name
 - a) **Approved** - notifies the next approver by email to approve or deny training.
 - b) **Denied** - notifies by email the Initiator that training has been denied.
 - c) **Recycled** - notifies by email the previous approver or the Initiator that additional information is necessary or that he or she is the wrong approver.

NOTE: If you deny or recycle a training request, it is very important to enter your comments in the appropriate Remark field because the remarks entered in these fields will be included in the email notification. There is a Recycle Remarks field for each approver and one Denial Remarks field.

- d) **Reassign** – feature not being used at present

- ◆ **Click** on action and system will go into *Processing* mode

10. **Click** on the *SAVE* button at bottom left of page, the system will go into *Processing* mode and then you will see *SAVED* in upper right corner of page
11. After Approval/Denial/Reassign or Recycle action is saved you will see notation that request has been Successfully Submitted and the work item no longer appears under the approver's worklist, once it has been completed.
12. You can then click on View Worklist (to see next request in list) or Log Out